DOCUMENT RESUME

ED 046 096 EA 003 220

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TITLE	An Investigation of the Responsibilities and Duties of Educational Project Managers.
INSTITUTION	Ohio State Univ., Columbus. Educational Program Management Center.
PUB DATE	Sep 70
NOTE	41p.
EDRS PRICE	EDRS Price MF-$0.65 HC-$3.29
DESCRIPTORS	*Administrative Personnel, *Administrator Responsibility, *Educational Programs, *Management, *Research Projects

ABSTRACT

This document reports the results of a checklist questionnaire administered to two different groups of educational project managers. Study results are reported in both tabular and descriptive forms. Copies of the initial and revised checklists are appended. (LLR)

ED 046096

An Investigation of the Responsibilities and Duties of Educational Project Managers

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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EDO 46096

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The Problem

The concept of Project Management (also referred to as Systems Management and Program Management) has been evolving for more than two decades primarily as a correlate of large scale governmental mission oriented activities. While its general origin is traced to the military establishment, the concept has entered into other areas of the economy, particularly in business and industry. New techniques and procedures (e.g., PERT, CPM, matrix or overlay organizational structures) have been developed and operationalized in order to provide project managers with assistance in achieving mission goals within time, cost, and performance specifications while working under degrees of complexity and uncertainty.

Within the past several years, the educational community has recognized the need for better project management if significant changes are to be brought about in the educational enterprise. This need has developed as a consequence of the acceleration of federal funds into educational activities on the one hand and the public demand for educational efficiency and accountability on the other.

Even though a need exists with regard to educational project management, available knowledge regarding its role in education is relatively small. Most of the literature devoted to the concept is

addressed to business, industry, and the military services. The educational situation has certain characteristics which require modification of the concept if it is to be successfully utilized. Among such characteristics are the traditional nine-month school year and the lack of freedom to employ and discharge personnel as needed according to project resource requirements.

Systematic efforts have been initiated to advance the knowledge about project management but they have been directed largely to the study of tools and techniques. A prime example was the development project undertaken by Cook to study the applicability of PERT to educational research and development activities. The success of this effort lead to the subsequent funding, by the Research Training Branch of the Office of Education, of two series of training institutes in order to disseminate information about relevant management tools and techniques to educational research and development personnel.

Two major observations derived from the series of training sessions. First, tools and techniques like PERT are subservient to the more general concept of project management. Second, a strengthening of the recognition that the duties and responsibility of project managers in education are not isomorphic to those in business and industry due to the institutional characteristic as noted earlier. A better understanding of the function of project management in education therefore becomes a prerequisite for effective development of subsequent training programs and the employment of the concept on projects.

The Educational Program Management Center established as one of its major objectives for the 1969-70 year the exploration of the concept of project management as it functions in the local educational setting. This report presents an accomplishment with regard to one subobjective of this larger objective. The specific subobjective focuses upon identification of the duties, responsibilities, and authority associated with the position of project manager in an LEA.

It was felt that identification of these characteristics was an appropriate place to initiate work on the objective since many writers discussing success and failure of project management have stressed the importance of these factors. Clear patterns of authority and responsibility are deemed necessary if the project manager is to have the freedom to adjust project plans and operations as necessary to achieve project objectives within time, cost, and performance specifications. Failure by the organizational structure to provide such clarification has been pointed out as a leading cause of project efforts being largely unsuccessful and the project management concept being abandoned as unworkable.

The Procedure

The original plan for the study called for a review of the literature on project management to be made from which an instrument would be developed and eventually administered to a sample of local education agency project managers. An unexpected opportunity to secure empirical data arose when the senior author was invited to present concepts of project management to the Program Auditor

Institutes sponsored by the Bureau of Elementary and Secondary Education, Office of Education, in connection with the "accountability" concept being implemented in Titles VII and VIII of ESEA as amended in 1967.

During the summer of 1969, a review of existing books, journals, and related publications on project management was made in order to establish a list of duties and responsibilities. The review was continued until it appeared that the search was producing redundant information with regard to the desired variables. The identified duties and responsibilities were assembled into a checklist with the series of statements categorized under the management functions of planning, organizing, directing, and controlling. An assumption was made that the individual statements could be validly so classified. Several of the identified duties and responsibilities could not be discretely classified with a given function, so were repeated under different functions. A copy of this initial checklist is attached to this report as Appendix A.

As noted above, the original intent was to administer the checklist to a representative sample of educational project managers but the availability of the convenience sample lead to the initial administration of the checklist. Recognition is made here of the limitations of using such a sampling procedure but a decision was made that the participants represented a rather typical cross section of those persons who might reasonably be considered as potential project managers or actually employed as project managers. A brief description of the convenience sample might be helpful.

The implementation of the accountability concept and its associated concept of Independent Educational Auditing as part of the Bilingual and Dropout Prevention Programs of BESE required that a training period be established and conducted. The concept of Project Management was included as one of the topics to be included in the overall training package. Participants to attend the several training sessions, held in Washington and Newport Beach, were drawn from the several funded projects. Three major position types were drawn from each project; project manager (or director), the project evaluator, and the independent educational auditor. The first two were actual project staff members whereas the third position was usually established by a contractual arrangement with an agency outside the project.

The training program specifications stated that a pretest-posttest arrangement was to be made for each presentation. For the initial session of four planned sessions, a locally constructed multiple choice type achievement examination focusing principally on network techniques was used in connection with the Project Management component. Failure of many persons to complete the pretest (administered by mail) and the lack of relevancy of the test to the presentation due to the reduction of original time limits allowed for the presentation led to a decision not to use the achievement examination at the second planned session. After some consideration, a decision was made to employ the initial checklist as a substitute for the pretest-posttest procedure. It was felt that the checklist might serve as a motivating device for the topic, provide a basis for discussion after the presentation, as well as provide data for the study.

The initial checklist was administered to approximately 60 participants at the second training session held in Washington, D. C. on October 17-19, 1969. Respondents were asked to indicate their position in the project, their institutional affiliation, and their experience with project management. One administration of the checklist was made prior to the presentation with the respondents being asked to check those duties and responsibilities which they believed should be performed by a project manager. The checklist was administered again after an approximate two-hour presentation on project management. The participants were told on this administration to check those duties and responsibilities which they actually performed. This arrangement has the appearance of a simple quasi-experimental design although this was not the intent of the procedure. It was anticipated that the first administration would reflect the respondents about how they saw their present positions and that the second administration might reflect how they might actually perform in terms of increased knowledge about project management. To this extent, the presentation could be viewed as a treatment affecting answers on the second administration.

Of the total group, 40 participants completed both administrations and their responses were used in subsequent data analysis. A test of correlated proportions was used to determine significant differences between responses on the two administrations. It was hoped that this procedure would help to identify those duties and responsibilities which had the greatest discrepancy between should and actual conditions. In some cases, the small number of participants associated with an agency or institution lead to samples being

too small for meaningful analysis. Data were combined into more general categories when this happened.

The data produced confounding results between the items classified under the several management functions because of ambiguity and duplication of items as shown in the results section. Further, there was some dissatisfaction because the scale was not designed for meaningful statistical analysis and the items were not exhaustive of the project management duties and responsibilities.

Efforts were undertaken to revise the initial checklist. Another review was made of the literature to make sure that a more exhaustive list was generated. The form of the checklist was changed with the classification of items under the several management functions being eliminated and along with duplicate items. A copy of the revised checklist is included as Appendix B.

The revised checklist was administered at the third session of Auditor Institutes held at Newport Beach, California in November, 1969. Prior to the presentation on project management, the participants were asked as before to check those duties and responsibilities which they felt a project manager should carry out. A total of 83 persons completed useful instruments for analysis. No second or posttest administration was made in view of an adjustment in the training program specifications reducing the sheer amount of pretest-posttest arrangements. To secure a sample of actual duties and responsibilities, the checklist was administered as a posttest at the fourth session of the Auditor Institutes held also at Newport Beach in November 1969. Due to modified arrangements, the presentation on project management was moved from an initial session in the total program to the last session on the third day. Consequently, a large number of possible respondents had left the session. A total of 40 useful responses were

secured from this administration.

Responses to the administration of the revised checklist were processed using the Ohio State Questionnaire Analysis Program. In addition to frequency and percentage of responses, the OSQA provides approximate Chi-Square Values for individual items by participant classification groups.

The Results

As described earlier, the data were collected by the use of an initial and revised checklist. The presentation of results and findings will follow this same pattern. The results from the initial checklist are presented first followed by the revised checklist results.

Initial Checklist

The data from the analysis of the checklists from the 40 persons completing both administrations is presented in Table 1. The table summarizes the frequency and proportion of responses for the items classified under the management functions of planning, organizing, directing, and controlling respectively. Table 1 also presents the "z" value obtained from the test of correlated proportions. The positive or negative sign associated with the tabled "z" value indicates shift in frequency of response from the first administration to the second administration. In this case, these changes here would reflect a change from what should be duties and responsibilities to what were considered to be actual duties engaged in by the participants attending the institutes.

Inspection of the frequencies and proportions presented in Table 1 reveals that there was a high degree of consistency between should and actual responses with a few exceptions. In the cases of

TABLE 1 - Should versus Actual Duties and Responsibilities: Initial Checklist (N=40)

TASKS - Planning	FREQUENCY		PERCENT		z
	Should	Actual	Should	Actual	
1. Preparing the initial proposal	36	39	90	98	1.34
2. Select the project staff	40	33	100	83	-2.65*
3. Identify all resources, personnel and physical facilities needed to accomplish the project	32	35	80	88	.83
4. Design all phases of the project	12	20	30	50	1.15
5. Concentrate attention solely on one project at a time	24	22	60	55	-.34
6. Work on several projects at one time	8	10	20	25	.22
7. Develop financial needs of the project	39	36	98	90	-1.34
8. Assign personnel to specific project tasks	32	32	80	80	.00
9. Use a management control technique for planning and scheduling (PERT, Gantt, and milestone charts, etc.)	32	38	80	95	1.90
10. Obtain physical facilities to house project staff	28	26	70	65	-.39
11. Have flexibility in designing project within predetermined specifications	36	36	90	90	.00
12. Closely define authority and responsibility of subordinates	32	33	80	83	.26
13. Participate in project design	38	38	95	95	.00
14. Have professional competence in specific area under investigation in project	36	31	90	78	-1.39
15. Designate funds to various phases of the work within the project	38	33	95	83	-1.67
16. Establish important milestones for the project	37	37	93	93	.00
17. Establish dates at which milestones should be accomplished	40	38	100	95	-1.41
18. Clearly set forth the responsibilities of everyone in the project	32	33	80	83	.26
19. Outline steps needed to be taken to reach objective	31	35	78	88	1.07
20. Submit unsolicited proposals	21	13	53	33	-1.18
21. Respond to solicited requests for a proposal	29	20	73	50	-1.62

* Significant at P = .05 level (two tail test)
** Significant at P = .01 level (two tail test)

TABLE 1 (continued) - Should versus Actual Duties and Responsibilities: Initial Checklist (N=40)

TASKS - Organizing	FREQUENCY		PERCENT		z
	Should	Actual	Should	Actual	
1. Identify all operations needed to achieve the objective	37	36	93	90	-.38
2. Select project staff	39	37	98	93	-1.00
3. Design all phases of the project	20	24	50	60	.67
4. Concentrate attention solely on one project at a time	25	25	63	63	.00
5. Work on several projects at one time	13	10	33	25	-.40
6. Assign personnel to specific project tasks	38	32	95	80	-1.90
7. Authority to assign priority levels	35	36	88	90	.33
8. Assign personnel to specific project assignments	23	35	58	88	2.56*
9. Use a management control technique for scheduling (PERT, Gantt, and milestone charts, etc.)	37	37	93	93	.00
10. Closely define authority and responsibility of subordinates	33	33	83	83	.00
11. Allocate various time periods for completion of different	36	35	90	88	-.33
12. Establish important milestones for the project	39	34	98	85	-1.89
13. Establish dates at which milestones should be accomplished	36	37	90	93	.38
14. Expect subordinates to give advice freely	35	30	88	75	-1.29
15. Clearly set forth the responsibilities of everyone on the project	31	35	78	88	1.07
16. Outline steps needed to be taken to reach objective	35	37	88	93	.71
17. Obtain physical facilities to house project staff	37	33	93	83	-1.27
18. Designate funds to various phases of work within the project	36	31	90	78	-1.39

* Significant at P = .05 level (two tail test)
** Significant at P = .01 level (two tail test)

TABLE 1 (continued) - Should versus Actual Duties and Responsibilities: Initial Checklist (N=40)

TASKS - Directing	FREQUENCY		PERCENT		z
	Should	Actual	Should	Actual	
1. Participate as an active team member	35	31	88	78	-1.07
2. Coordinate the efforts of all project staff	37	40	93	100	1.73
3. Concentrate attention solely on one project at a time	18	23	45	58	.80
4. Work on several projects at one time	7	10	18	25	.38
5. Use a management control technique for planning and scheduling (PERT, Gantt and milestone charts, etc.)	33	37	83	88	1.27
6. Authority to assign priority levels	35	38	88	95	1.13
7. Closely define authority and responsibility of subordinates	31	33	78	83	.50
8. Sole authority for supervision of project	13	29	33	73	2.60*
9. Assign personnel to specific project tasks	31	34	78	85	.77
10. Report regularly to a higher level (or funding agency) on progress of project	29	33	73	83	.94
11. Have authority to make decision on trade-offs between schedules and budgets	35	34	88	85	-.33
12. Hold regularly scheduled staff meetings	37	33	93	83	-1.26
13. Record all important work thoroughly	32	30	80	75	-.47
14. Have complete control over budget allocated for the project	34	33	85	83	-.28
15. Allocate funds for approved work	35	33	88	83	-.58
16. Reallocate funds to work tasks as necessary	36	33	90	83	-.90
17. Coordinate the efforts of project staff	39	37	98	93	-1.00
18. Issue periodic progress reports	38	32	95	80	-1.90
19. All incoming information goes through project director	33	28	83	70	-1.15
20. Expects subordinates to give advice freely	37	29	93	73	-2.14*
21. Have authority to dismiss staff who are not performing	36	31	90	78	-1.39
22. Give credit when due to individual staff members	38	36	95	90	-.82
23. Outline steps which need to be taken to reach objective	37	32	93	80	-1.51

* Significant at P = .05 level (two tail test)
** Significant at P = .01 level (two tail test)

TABLE 1 (continued) - Should versus Actual Duties and Responsibilities: Initial Checklist (N=40)

TASKS - Controlling	FREQUENCY		PERCENT		z
	Should	Actual	Should	Actual	
1. Participate as an active team member	19	31	48	78	+2.19*
2. Sole authority for supervision of project	13	27	33	68	2.21*
3. Concentrate attention solely on one project at a time	18	33	45	83	2.79*
4. Evaluate performance of personnel in meeting assigned objectives	33	31	83	78	-.50
5. Use management control technique for keeping track of project schedules and budget (PERT, Gantt and milestone charts, etc.)	32	36	80	90	1.15
6. Monitor work to assure conformance to project plan	31	33	78	83	.50
7. Report regularly to higher level (or funding agency) on progress of project	33	35	83	88	.58
8. Hold regularly scheduled staff meetings	35	33	88	83	-.58
9. Record all important work thoroughly	33	33	83	83	.00
10. Have authority to make decisions on trade-offs between schedules and budget	38	31	95	78	-2.11*
11. Have complete control over budget allocated for the project	29	29	73	73	.00
12. Allocate funds for approved work	36	30	90	75	-1.60
13. Reallocate funds to work tasks as necessary	37	33	93	83	-1.27
14. Work on several projects at one time	8	11	20	28	.38
15. Expects project personnel to carry out all orders without quibbling	6	14	15	35	1.03
16. Have authority to dismiss staff who are not performing	35	31	88	83	-1.07

* Significant at P = .05 level (two tail test)
** Significant at P = .01 level (two tail test)

duplicate items, there was not always consistency of response. For example, the task "assign personnel to specific project tasks" appeared in three of the functions. Under Planning, the should and actual proportions were the same but in the Organizing function there was a significant change. The same item under Directing showed only a small change from should to actual.

Of the total of 78 items appearing on the checklist (including duplicates), eight were found to be significant at the .05 level using a two-tailed test. The items are listed below by function in which they appeared.

Planning

2. Select the project staff

Organizing

8. Assign personnel to specific project task

Directing

8. Sole authority for supervision of project

20. Expect subordinates to give advice freely

Controlling

1. Participate as an active team member

2. Sole authority for supervision of project

3. Concentrate attention solely on one project at a time

10. Have authority to make decisions on trade-offs between schedules and budget

The above results are suspect for two reasons. First, it is quite likely that in conducting approximately 80 tests of significance, eight might be significant by chance alone. Second, it is hard to discover just how the participants were responding. For example, the task "participate as an active team member" appeared on the Directing and

Controlling functions. In the former case, there was a decline from should to actual. In the latter function, there was a significant change from should to actual.

The ambiguity of these kinds of results lead to the revision of the checklist as described in the procedures. The results from the revised checklist are presented in the next section.

Revised Checklist

As described in the procedures section, the results from the revised checklist were obtained from two different groups of respondents in contract to using the same group as in the initial checklist. Three analyses of the responses to the checklist were made. One analysis covered overall differences between should and actual tasks; a second with possible influence of an experience variable in project management; and the third examined the possible influence of a location variable. Each of these three analyses are presented below.

Overall Responses The responses to the several revised checklist items by the shoulds and actual groups are presented in Table 2. Of the total of 57 items, five were observed to have significantly different responses between the two groups. The five items are as follows:

Have sole responsibility for project design
Work on one project at a time
Develop formal budget
Devoted most of management time to the functions of planning and controlling
Reply to all correspondence related to the project.

For each item, the difference was in favor of the actual groups. In terms of the intent of the checklist, this would be saying that these duties are more often "actually" carried out by project directors than what they should carry out. Substantively, these results would

TABLE 2 - Should and Actual Duties and Responsibilities for Project Managers - Revised Checklist

Duties and Responsibilities	Should (N=83) f	Should (N=83) %	Actual (N=40) f	Actual (N=40) %	Chi-Square
1. Prepare the initial proposal	58	70	33	83	1.72
2. Participate in contract negotiations	64	77	35	88	1.17
3. Have sole responsibility for project design	4	5	12	30	6.85*
4. Delegate responsibility for project design	36	43	16	40	0.12
5. Work on one project at a time	19	23	19	48	6.59*
6. Work on several projects at one time	20	24	9	23	0.03
7. Submit unsolicited proposals	24	29	11	28	0.02
8. Respond to solicited requests for a proposal	37	45	24	60	2.57
9. Have professional competence in specific area under investigation	61	74	33	83	.88
10. Possess a solid background in educational research methodology	44	53	14	35	3.50
11. Possess a significant degree of technical competence in the critical areas of the project	53	64	31	78	2.01
12. Be a generalist rather than a specialist	31	37	19	48	1.12
13. Identify scheduling constraints	52	63	28	70	0.58
14. Estimate manpower requirements	66	80	34	85	0.32
15. Have flexibility in designing project within predetermined specifications	60	72	33	83	1.13
16. Identify physical facilities necessary for staff and project operation	67	81	35	88	0.50
17. Secure physical facilities	47	57	19	48	0.90
18. Select project personnel	74	89	36	90	0.01
19. Train and develop personnel in order to carry out the activities called for in the project	57	69	27	68	0.07
20. Assign personnel to specific project tasks	71	86	34	85	0.00
21. Supervise, coordinate and control the activities of project personnel	70	84	40	100	2.65
22. Define authority lines	64	77	33	83	0.31
23. Define responsibilities of subordinates	64	77	34	85	0.67
24. Expect subordinates to give advice freely	52	63	32	80	3.25
25. Determine financial needs of project	65	78	38	95	3.01
26. Develop the formal budget	44	53	31	78	6.47*
27. Have authority to make all decisions relating to project (vertical line)	37	45	18	45	0.01
28. Have authority to direct the work on the project, regardless of the organizational level of responsible person assigned to a task (horizontal movement across vertical lines)	47	57	25	63	0.37
29. Report regularly to a higher level on progress of project	67	81	33	83	0.03
30. Prepare written technical progress reports	46	55	23	58	0.05

*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 2 (continued) - Should and Actual Duties and Responsibilities for Project Managers - Revised Checklist

Duties and Responsibilities	Should (N=83)		Actual (N=40)		Chi-Square
	f	%	f	%	
31. Use a management control technique for planning and scheduling (PERT, bar chart, milestone charts, etc.)	65	78	80	75	0.12
32. Have authority to assign priority levels	65	78	33	83	0.19
33. Allocate various time periods for completion of different phases of the project based upon talents of project staff	57	69	30	75	0.43
34. Designate funds to various phases of work within the project	52	63	29	73	1.05
35. Have authority to make decisions on trade-offs between schedules, budgets, and performance of project personnel	47	69	30	75	0.43
36. Evaluate the performance of project personnel	67	81	33	83	0.03
37. Have authority to dismiss personnel who are not performing	61	74	28	70	0.13
38. Give credit when due to individual staff members	68	82	37	93	1.26
39. Hold regularly scheduled staff meetings	68	82	38	95	1.84
40. Use face-to-face communications as the best method to accomplish the management job	53	64	32	80	2.81
41. Devote most of management time to the functions of organizing and directing	33	40	12	30	1.03
42. Devote most of management time to the functions of controlling and organizing	9	11	4	10	0.01
43. Devote most of management time to the functions of planning and organizing	27	33	7	18	2.44
44. Devote most of management time to the functions of planning and controlling	14	17	17	43	7.09*
45. Devote most of management time to the functions of controlling and directing	19	23	6	15	0.67
46. Devote most of management time to the functions of planning and directing	28	34	11	28	0.42
47. Outline steps needed to be taken to reach objectives	53	64	29	73	0.81
48. Establish important milestones for the project	60	72	32	80	0.64
49. Establish dates at which milestones should be accomplished	57	69	32	80	1.38
50. Never allow slippages or overruns to occur	7	8	1	3	0.38
51. Require all incoming external information to flow through the project director	36	43	23	58	2.15
52. Reply to all correspondence related to project	31	37	26	65	8.25*
53. Participate as an active team member	62	75	31	78	0.08
54. Record all important work thoroughly	48	58	21	53	0.31
55. Prepare evaluative report at completion of project	41	49	18	45	0.21
56. Should have a degree in Educational Administration	23	28	11	28	0.00
57. Possess experience in a sector of the economy other than in the field of education	13	16	9	23	0.47

indicate that much of the burden of project administration occurs in actual situations whereas in an idealized situation these burdens would be seen as being less desirable.

In addition to the above results, several other observations are of interest. There was a rather strong consistency of frequency and percentage of response to each item in general. Both groups would agree strongly together or disagree strongly together (e.g., items 38 and 52). There was also a rather strong consistency of response to items 51 through 56 where the number and percentage of participants responding to these items was relatively small in both groups compared to the other items with the exception of item 54 as noted earlier. These items were rather broad in nature while the balance of the items were rather specific task oriented. It may have been that the broad statements were not favorably seen because of their vagueness and ambiguity whereas the specific statements were activities falling within the direct experience of the persons attending the workshops. In the case of item 54, an interpretation of the difference might be the fact that the actual group completed the checklist after the presentation on Project Management where these two functions were highly stressed.

The results from the overall analysis of the second checklist can be summarized around one major point. The respondents were pretty much in agreement regarding the activities that would fall into the realm of project management as noted by their agreement on the relative imporance of the duty and responsibility. Their failure to differentiate significantly between should and actual duties except in the case of five items, can be perceived as a lack of difference between the actual situations and the idealized case. The tasks with significant differences in turn focused largely upon duties which can be viewed as

organizational-administrative in nature.

Experience Using information supplied by the respondents, participants were categorized as being experienced or inexperienced in project management. Classification was made on the basis of whether or not the participant had directed or was currently directing a project. Table 3 presents the results of this analysis.

Responses to should and actual duties were pretty much the same for both groups with the individual items following the same patterns of overall percentage of responses. Only a single item (56 - Should have a degree in Educational Administration) was identified as being significantly related to the experience variable. Analysis revealed that the experienced project managers indicated that this was more an actual condition than did the inexperienced project managers.

Inspection of the individual items shows some interesting differences in responses between the two groups on should and actual duties and responsibilities. For example, there is little expression under the shoulds that the project manager have sole responsibility for project design. Under the actuals, there appears to be more of a tendency that this duty is actually assumed under project conditions. An interesting pattern shows in item 21 where both categories of personnel agree that supervision, coordination, and control of the activities of project personnel is actually undertaken by the project manager or director.

It would appear from an overview of data presented in Table 3 that an experience variable does not appear to differentiate strongly the duties and responsibilities that should be or are actually carried out by a project director or manager.

TABLE 3 - Experience as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	E(N=46)		I(N=37)			E(N=17)		I(N=23)		
	f	%	f	%		f	%	f	%	
1. Prepare the initial proposal	34	74	24	65	0.67	15	88	18	78	0.39
2. Participate in contract negotiations	35	76	29	78	0.04	14	82	21	91	0.31
3. Have sole responsibility for project design	1	2	3	8	0.29	7	41	5	22	1.48
4. Delegate responsibility for project design	19	41	17	46	0.18	7	41	9	39	0.02
5. Work on one project at a time	7	15	12	32	2.43	10	59	9	39	1.52
6. Work on several projects at one time	14	30	6	16	1.66	3	18	6	26	0.28
7. Submit unsolicited proposals	17	37	7	19	2.67	6	35	5	22	0.72
8. Respond to solicited requests for a proposal	23	50	14	38	1.21	10	59	14	61	0.02
9. Have professional competence in specific area under investigation	31	67	30	81	1.53	15	88	18	78	0.39
10. Possess a solid background in educational research methodology	27	59	17	46	1.33	7	41	7	30	0.45
11. Possess a significant degree of technical competence in the critical areas of the project	29	63	24	65	0.03	12	71	19	83	0.56
12. Be a generalist rather than a specialist	17	37	14	38	0.01	11	65	8	35	3.50
13. Identify scheduling constraints	30	65	22	60	0.27	14	82	14	61	1.80
14. Estimate manpower requirements	35	76	31	84	0.49	15	88	19	83	0.12
15. Have flexibility in designing project within pre-determined specifications	33	72	27	73	0.01	16	94	17	84	1.60
16. Identify physical facilities necessary for staff and project operation	38	83	29	78	0.15	14	82	21	91	0.31
17. Secure physical facilities	24	52	23	62	0.82	9	53	10	44	0.35
18. Select project personnel	41	29	33	89	0.00	14	82	22	96	0.69
19. Train and develop personnel in order to carry out the activities called for in the project	32	70	25	68	0.03	13	77	14	61	0.95
20. Assign personnel to specific project tasks	40	87	31	84	0.08	14	82	20	87	0.08
21. Supervise, coordinate and control the activities of project personnel	40	87	30	81	0.28	17	100	23	100	0.00
22. Define authority lines	36	78	28	76	0.05	13	77	20	87	0.43
23. Define responsibilities of subordinates	35	76	29	78	0.04	14	82	20	87	0.08
24. Expect subordinates to give advice freely	31	67	21	57	0.93	16	94	16	70	2.36

Notes: E=Experienced, I=Inexperienced
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 3 (continued) - Experience as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	E(N=46)		I(N=37)			E(N=17)		I(N=23)		
	f	%	f	%		f	%	f	%	
25. Determine financial needs of project	37	80	28	76	0.19	16	94	22	96	0.01
26. Develop the formal budget	25	54	19	51	0.07	15	88	16	70	1.36
27. Have authority to make all decisions relating to project (vertical line)	20	44	17	46	0.05	9	53	9	39	0.75
28. Have authority to direct the work on the project, regardless of the organizational level of the responsible person assigned to a task (horizontal movement across vertical lines)	28	61	19	51	0.74	12	71	13	57	0.77
29. Report regularly to a higher level on progress of project	36	68	31	84	0.25	14	82	19	83	0.00
30. Prepare written technical progress reports	23	50	23	63	1.12	10	59	13	57	0.02
31. Use a management control technique for planning and scheduling (PERT, bar chart, milestone charts, etc.)	35	76	30	81	0.20	13	77	17	74	0.03
32. Have authority to assign priority levels	34	74	31	84	0.80	14	82	19	83	0.00
33. Allocate various time periods for completion of different phases of the project based upon talents of project staff	33	72	24	65	0.39	12	71	18	78	0.23
34. Designate funds to various phases of work within the project	33	72	19	51	3.41	13	77	16	70	0.19
35. Have authority to make decisions on trade-offs between schedules, budgets, and performance of project personnel	34	74	23	62	1.13	11	65	19	83	1.25
36. Evaluate the performance of project personnel	39	85	28	76	0.68	14	82	19	83	0.00
37. Have authority to dismiss personnel who are not performing	35	76	26	70	0.28	12	71	16	70	0.00
38. Give credit when due to individual staff members	40	98	29	87	1.04	16	94	21	91	0.03
39. Hold regularly scheduled staff meetings	38	83	30	81	0.02	17	100	21	91	0.30
40. Use face-to-face communications as the best method to accomplish the management job	29	63	24	65	0.03	15	88	17	74	0.80
41. Devote most of management time to the functions of organizing and directing	16	35	17	46	1.02	7	41	5	22	1.48
42. Devote most of management time to the functions of controlling and organizing	5	11	4	11	0.00	1	6	3	13	0.20

Notes: E=Experienced, I=Inexperienced
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 3 (continued) - Experience as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	E(N=46)		I(N=37)			E(N=17)		I(N=23)		
	f	%	f	%		f	%	f	%	
43. Devote most of management time to the functions of planning and organizing	19	41	8	22	3.18	3	17	4	17	0.00
44. Devote most of management time to the functions of planning and controlling	11	24	3	8	2.05	8	47	9	39	0.25
45. Devote most of management time to the functions of controlling and directing	12	26	7	19	0.42	2	12	4	17	0.12
46. Devote most of management time to the functions of planning and directing	17	37	11	30	0.43	4	24	7	30	0.19
47. Outline steps needed to be taken to reach objectives	31	67	22	60	0.52	15	88	14	61	2.93
48. Establish important milestones for the project	34	74	26	70	0.18	14	82	18	78	0.07
49. Establish dates at which milestones should be accomplished	33	72	24	65	0.39	13	77	19	83	0.15
50. Never allow slippages or overruns to occur	3	7	4	11	0.15	1	6	0	0	0.14
51. Require all incoming external information to flow through the project director	16	35	20	54	3.05	10	59	13	57	0.02
52. Reply to all correspondence related to project	18	39	13	35	0.13	12	71	14	61	0.37
53. Participate as an active team member	35	76	27	73	0.08	13	77	18	78	0.01
54. Record all important work thoroughly	28	61	20	54	0.38	9	53	12	52	0.00
55. Prepare evaluative report at completion of project	23	50	18	49	0.01	10	59	8	35	2.26
56. Should have a degree in Educational Administration	16	35	7	19	2.06	9	53	2	9	7.65*
57. Possess experience in a sector of the economy other than in the field of education	8	18	5	14	0.15	3	18	6	26	0.28

Notes: E=Experienced, I=Inexperienced
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

Location Following a procedure similar to that for the experience variable, participants were classified as being from a local education agency or some other organizational unit (state department, Office of Education, consulting firm, university). This latter group was labeled as Non-LEA personnel. The categorization was made in order to examine possible relationships under an orientation that all of the projects involved were situated in local school districts. It seemed reasonable that LEA project personnel directly involved in a project might differ in their responses from those not so directly involved.

Analysis of the responses by location is presented in Table 4. The same general pattern of responses was again noted but in this case five items were found to be significant at the .05 level of greater. These items were located in the should category and generally showed greater agreement for LEAs as opposed to non-LEAs. Inspection of the significant items as a group indicates a focus upon what might be called "organizational housekeeping" duties. The responses might be possibly interpreted to reflect a concern on the part of LEA project directors with detail or "record keeping" as reflected in responses to item 54 - "Record all important work thoroughly." As in the case of experience, the LEA project directors felt that a degree in Educational Administration was desirable. It seems reasonable, based upon the results in Table 4 to hypothesize that ther is a concern on the part of the project directors with project detail. This hypothesis might reflect the type of environment in which they operate. This is, these behaviors are what count in the local school district environment generall and therefore they rate highly as desirable duties and responsibilities. Those removed from the environment apparently feel that the type of detail activity

TABLE 4 - Location as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	LEA (N=46)		N-L (N=37)			LEA (N=22)		N-L (N=18)		
	f	%	f	%		f	%	f	%	
1. Prepare the initial proposal	30	65	28	76	0.90	19	86	14	78	0.29
2. Participate in contract negotiations	34	74	30	81	0.42	18	82	17	94	0.63
3. Have sole responsibility for project design	4	9	0	0	0.62	9	41	3	17	2.33
4. Delegate responsibility for project design	20	44	16	43	0.00	11	50	5	28	1.96
5. Work on one project at a time	11	24	8	22	0.04	13	59	6	33	2.63
6. Work on several projects at one time	10	22	10	27	0.23	5	23	4	22	0.00
7. Submit unsolicited proposals	14	30	10	27	0.10	8	36	3	17	1.54
8. Respond to solicited requests for a proposal	22	48	15	41	0.44	13	59	11	61	0.02
9. Have professional competence in specific area under investigation	34	74	27	73	0.01	19	86	14	78	0.29
10. Possess a solid background in educational research methodology	25	54	19	51	0.07	9	41	5	28	0.68
11. Possess a significant degree of technical competence in the critical areas of the project	32	70	21	57	1.35	16	73	15	83	0.45
12. Be a generalist rather than a specialist	17	37	14	38	0.01	13	59	6	33	2.63
13. Identify schedulint constraints	28	61	24	65	0.13	18	82	10	56	2.73
14. Estimate manpower requirements	36	78	30	81	0.07	19	86	15	83	0.04
15. Have flexibility in designing project within predetermined specifications	32	70	28	76	0.31	21	96	12	67	3.28
16. Identify physical facilities necessary for staff and project operation	38	83	29	78	0.15	19	86	16	89	0.03
17. Secure physical facilities	26	57	21	57	0.00	13	59	6	33	2.63
18. Select project personnel	41	89	33	89	0.00	19	86	17	94	0.26
19. Train and develop personnel in order to carry out the activities called for in the project	33	72	24	65	0.39	16	73	11	61	0.53
20. Assign personnel to specific project tasks	41	89	30	81	0.53	19	86	15	83	0.04
21. Supervise, coordinate and control the activities of project personnel	41	89	29	68	0.95	22	100	18	100	0.00
22. Define authority lines	35	76	29	78	0.04	18	82	15	83	0.01

Notes: LEA= Local Education Agency; N-L=Non-Lea Personnel
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 4 (continued) - Location as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	LEA (N=46)		N-L (N=37)			LEA (N=22)		N-L (N=18)		
	f	%	f	%		f	%	f	%	
23. Define responsibilities of subordinates	38	83	26	70	1.25	19	86	15	83	0.04
24. Expect subordinates to give advice freely	31	67	21	57	0.93	20	91	12	67	2.33
25. Determine financial needs of project	38	83	27	73	0.76	20	91	18	100	0.33
26. Develop the formal budget	27	59	17	46	1.33	19	86	12	67	1.54
27. Have authority to make all decisions relating to project (vertical line)	21	46	16	43	0.05	11	50	7	39	0.49
28. Have authority to direct the work on the project, regardless of the organizational level of the responsible person assigned to a task (horizontal movement across vertical lines)	33	72	14	38	9.43	15	68	10	56	0.63
29. Report regularly to a higher level on progress of project	39	85	28	76	0.68	18	82	15	83	0.01
30. Prepare written technical progress reports	26	57	20	54	0.05	12	55	11	61	0.17
31. Use a management control technique for planning and scheduling (PERT, bar chart, milestone charts, etc.)	34	74	31	84	0.80	17	77	13	72	0.10
32. Have authority to assign priority levels	36	78	29	78	0.00	19	86	14	78	0.29
33. Allocate various time periods for completion of different phases of the project based upon talents of project staff	32	70	25	68	0.03	17	77	13	72	0.10
34. Designate funds to various phases of work within the project	28	61	24	65	0.13	18	82	11	61	1.70
35. Have authority to make decisions on trade-offs between schedules, budgets, and performance of project personnel	29	63	28	76	1.31	16	73	14	78	0.10
36. Evaluate the performance of project personnel	39	85	28	76	0.68	18	82	15	83	0.01
37. Have authority to dismiss personnel who are not performing	30	65	31	84	2.83	16	73	12	67	0.15

Notes: LEA= Local Education Agency; N-L=Non-Lea Personnel
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 4 (continued) - Location as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	LEA (N=46)		N-L (N=37)			LEA (N=22)		N-L (N=18)		
	f	%	f	%		f	%	f	%	
38. Give credit when due to individual staff members	38	83	30	81	0.02	20	91	17	94	0.05
39. Hold regularly scheduled staff meetings	41	89	27	73	2.14	21	96	17	94	0.00
40. Use face-to-face communications as the best method to accomplish the management job	33	72	20	54	2.57	19	86	13	72	0.79
41. Devote most of management time to the functions of organizing and directing	24	52	9	24	6.36*	10	46	2	11	4.67
42. Devote most of management time to the functions of controlling and organizing	7	15	2	5	0.79	2	9	2	11	0.02
43. Devote most of management time to the functions of planning and organizing	15	33	12	32	0.00	4	18	3	17	0.01
44. Devote most of management time to the functions of planning and controlling	8	17	6	16	1.01	9	41	8	44	0.05
45. Devote most of management time to the functions of controlling and directing	13	28	6	16	1.19	2	9	4	22	0.68
46. Devote most of management time to the functions of planning and directing	19	41	9	24	2.36	4	18	7	39	1.70
47. Outline steps needed to be taken to reach objectives	35	76	18	47	6.18*	19	86	10	56	3.76
48. Establish important milestones for the project	31	67	29	78	0.99	18	82	14	78	0.06
49. Establish dates at which milestones should be accomplished	32	70	25	68	0.32	18	82	14	78	0.06
50. Never allow slippages or overruns to occur	1	2	6	16	1.62	1	5	0	0	0.08
51. Require all incoming external information to flow through the project director	25	54	11	30	4.97	14	64	9	50	0.74
52. Reply to all correspondence related to project	23	50	8	22	6.61*	15	68	11	61	0.20

Notes: LEA = Local Education Agency; N-L = Non-Lea Personnel
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

TABLE 4 (continued) - Location as a Factor in Project Management Duties and Responsibilities - Revised Checklist

Duties and Responsibilities	SHOULD				x^2	ACTUAL				x^2
	LEA(N=46)		N-L(N=37)			LEA(N=22)		N-L(N=18)		
	f	%	f	%		f	%	f	%	
53. Participate as an active team member	39	85	23	62	4.20	16	73	15	83	0.45
54. Record all important work thoroughly	36	78	12	32	17.23**	12	55	9	50	0.08
55. Prepare evaluative report at completion of project	27	59	14	38	3.57	11	50	7	39	0.49
56. Should have a degree in Educational Administration	19	41	4	11	7.63*	9	41	2	11	3.52
57. Possess experience in a sector of the economy other than in the field of education	7	15	6	17	0.02	5	23	4	22	0.01

Notes: LEA = Local Education Agency; N-L = Non-Lea Personnel
*Significant at P = .05 level (two tail test)
**Significant at P = .01 level (two tail test)

represented by the statements should not be of great concern to the project director or manager. If this relationship is true, it would reinforce a common agreement among writers in the area of project management that persons having project responsibility should have the ability to direct the overall effort and not get bogged down in details of the project.

Location as a variable conditioning response seems to be relatively insignificant. What relationship does exist appears to focus concern on detail associated with a project, particularly in terms of duties and responsibilities which might be classified as organizational housekeeping in nature as viewed by persons serving as actual project directors.

Interpretation of Findings

Any substantive interpretation of the results presented in the prior section must be tempered by the method of data collection. The utilization of convenience samples with largely unknown characteristics is beset with hazards. In the specific case here, possible influences of the overall orientation program and setting may have conditioned participant responses. The a posteriori analysis under a "fishing expedition" approach as reported herein can only serve the purpose of generating hypotheses for possible future studies and not substitute for questions which were not in the original framework of the study. Given such limitations to any interpretation, several general findings might be made based upon the data.

Regardless of the particular format used for the checklist, participants did not seem to express any large number of meaningful

distinctions between what project managers "should" do on their job and what they "actually" do. This condition might be caused by either a failure of the items to discriminate between ideal and actual duties and responsibilities or participant experiences which says there are in fact no differences. The method by which the duties and responsibilities were obtained initially may also have been a factor. An examination of writings on project management may be leading only to recording prior "actual" experiences of project managers. If so, the results might have been predicted in advance. The few observed differences between ideal and actual might be due to particular conditions existing within a specific program or locale rather than any real difference between what a project manager should do and what he actually does.

Experience as a project manager and location of the project director in terms of place of employment did not appear to be variables contributing to pronounced differences in participant responses. What differences did occur seem to focus upon what might be called "housekeeping" functions. Since this finding obtained mostly in the actual duties and responsibilities of local education project managers, the responses might be reflecting the public school concern for detail and a loss of the overall picture which should be the major concern of an effective project director.

The findings presented above could also have been largely influenced by the fact that there was a relatively large number of persons who were inexperienced in project management. Asking such persons what should occur may be somewhat meaningless since they have no real basis from which to judge. In the case of the respondent

groups utilized, even though labeled as experienced may not have had sufficient experience since many had been appointed project directors only weeks before the training sessions.

Based upon the results presented and then interpretation, two condlusions seem apparent.

1. Few if any meaningful distinctions can be drawn between between the duties and responsibilities that should be or are actually carried out by educational project managers.
2. Where differences do occur, the duties and responsibilities involved tend to focus upon organizational-administrative-housekeeping activities.
3. Project management experience and respondents' institutional affiliation do not appear to be influential variables.

One apparent weakness of the study, besides the sampling problem, lies on the nature of the instrumentation. If future studies of this type are conducted, prior research and development should be carried out with regard to the instrument. Recommendations for such R and D work include the following actions.

1. A field test of the instrument on expert project managers.
2. An ordinal or interval scale be developed in order to secure variance in response.
3. Clarification of instructions for responding.

The Summary

The purpose of the study was to investigate the duties and responsibilities which educational projects managers should and actually carried. Responses from a convenience sample engaged in project management or associated with project directors revealed similar

acceptance and rejection of selected duties and responsibilities in both the should and actual conditions. Significant differences between should and actual duties and responsibilities centered upon administrative-housekeeping activities actually carried out by project managers. Experience as a project manager and institutional location of the respondent did not appear to be significant variables.

APPENDIX A - Initial Checklist

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

A Survey of Program/Project Management

The purpose of this survey is to determine the nature of the professional role of Project/Program Manager in Education. At the present time, not too much is known about the types of activities carried out by persons filling the role titled Project Director, Principal Investigator, and/or Project Manager.

Listed on the attached pages are sets of items which reflect duties, responsibilities, and activities which appear to have relevance for the position of project manager. These items have been categorized into the four functions of planning, organizing, directing, and controlling. Some overlapping of items exists between these functions but do not become concerned about this situation.

You are asked to place an "X" in front of only those items which you feel the program/project manager should perform as part of his position. Leave blank any item which you feel is not part of his position.

Before proceeding further, complete the items listed below.

1. I am attending this institute in the following role:
   - ☐ Project Manager/Director
   - ☐ Program Evaluator
   - ☐ Program Auditor

2. My institutional affiliation is as follows:
   - ☐ Local Education Agency
   - ☐ College or University
   - ☐ Non-Profit Educational Agency
   - ☐ State Education Agency
   - ☐ Management Consulting Firm

3. Have you ever been a project director in the past?
   - ☐ Yes
   - ☐ No

4. The last four digits of my SSN are as follows (To be used only for identification):

   ___ ___ ___ ___

Now complete the rest of the survey.

PLANNING:

_____ 1. Preparing the initial proposal

_____ 2. Select the project staff

_____ 3. Identify all resources, personnel and physical facilities needed to accomplish the project

_____ 4. Design all phases of the project

_____ 5. Concentrate attention solely on one project at a time

_____ 6. Work on several projects at one time

_____ 7. Develop financial needs of the project

_____ 8. Assign personnel to specific project tasks

_____ 9. Use a management control technique for planning and scheduling (PERT, Gantt and milestone charts, etc.)

_____10. Obtain physical facilities to house project staff

_____11. Have flexibility in designing project within predetermined specifications

_____12. Closely define authority and responsibility of subordinates

_____13. Participate in project design

_____14. Have professional competence in specific area under investigation in project

_____15. Designate funds to various phases of the work within the project

_____16. Establish important milestones for the project

_____17. Establish dates at which milestones should be accomplished

_____18. Clearly set forth the responsibilities of everyone in the project

_____19. Outline steps needed to be taken to reach objective

_____20. Submit unsolicited proposals

_____21. Respond to solicited requests for a proposal

ORGANIZING:

_____ 1. Identify all operations needed to achieve the objective

_____ 2. Select project staff

_____ 3. Design all phases of the project

_____ 4. Concentrate attention solely on one project at a time

_____ 5. Work on several projects at one time

_____ 6. Assign personnel to specific project tasks

_____ 7. Authority to assign priority levels

_____ 8. Assign personnel to specific project assignments

_____ 9. Use a management control technique for scheduling (PERT, Gantt, and milestone charts, etc.)

_____10. Closely define authority and responsibility of subordinates

_____11. Allocate various time periods for completion of different phases of the project based upon talents of project staff.

_____12. Establish important milestones for the project

_____13. Establish dates at which milestones should be accomplished

_____14. Expect subordinates to give advice freely

_____15. Clearly set forth the responsibilities of everyone on the project

_____16. Outline steps needed to be taken to reach objective

_____17. Obtain physical facilities to house project staff

_____18. Designate funds to various phases of work within the project

DIRECTING:

_____ 1. Participate as an active team member

_____ 2. Coordinate the efforts of all project staff

_____ 3. Concentrate attention solely on one project at a time

_____ 4. Work on several projects at one time

_____ 5. Use a management control technique for planning and scheduling (PERT, Gantt and milestone charts, etc.)

_____ 6. Authority to assign priority levels

_____ 7. Closely define authority and responsibility of subordinates

_____ 8. Sole authority for supervision of project

_____ 9. Assign personnel to specific project tasks

_____10. Report regularly to a higher level(or funding agency) on progress of project

_____11. Have authority to make decision on trade-offs between schedules and budgets

_____12. Hold regularly scheduled staff meetings

_____13. Record all important work thoroughly

_____14. Have complete control over budget allocated for the project

_____15. Allocate funds for approved work

_____16. Reallocate funds to work tasks as necessary

_____17. Coordinate the efforts of project staff

_____18. Issue periodic progress reports

_____19. All incoming information goes through project director

_____20. Expects subordinates to give advice freely

_____21. Have authority to dismiss staff who are not performing

_____22. Give credit when due to individual staff members

_____23. Outline steps which need to be taken to reach objective

CONTROLLING:

_____ 1. Participate as an active team member

_____ 2. Sole authority for supervision of project

_____ 3. Concentrate attention solely on one project at a time

_____ 4. Evaluate performance of personnel in meeting assigned objectives

_____ 5. Use management control technique for keeping track of project schedules and budget (PERT, Gantt and milestone charts, etc.)

_____ 6. Monitor work to assure conformance to project plan

_____ 7. Report regularly to higher level (or funding agency) on progress of project

_____ 8. Hold regularly scheduled staff meetings

_____ 9. Record all important work thoroughly

_____10. Have authority to make decisions on trade-offs between schedules and budget

_____11. Have complete control over budget allocated for the project

_____12. Allocate funds for approved work

_____13. Reallocate funds to work tasks as necessary

_____14. Work on several projects at one time

_____15. Expects project personnel to carry out all orders without quibbling

_____16. Have authority to dismiss staff who are not performing

35-a

APPENDIX B - Revised Checklist

Educational Program Management Center
College of Education
The Ohio State University
Columbus, Ohio 43210

A Survey of the Duties and Responsibilities of a Program/Project Manager

The purpose of this survey is to determine the nature of the professional role of the Program/Project Manager in Education. At the present time, not much is known about the types of activities performed by persons filling the role titled Project Director, Principal Investigator, and/or Project Manager.

Listed on the following pages are statements which reflect duties, responsibilities, activities and characteristics which appear to have relevance for the position of Project Manager.

You are requested to place an "X" in front of only those statements which you feel should pertain to a Program/Project Manager. Leave blank any item which you feel is not a part of his position.

1. I have performed or am performing as a Project Manager

   _____ Yes

   _____ No

2. My institutional affiliation is:

   _____ Local Education Agency

   _____ College or University

   _____ State Education Agency

   _____ Non-Profit Educational Agency

   _____ Management Consulting Firms

   _____ Other (Specify)

____ 1. Prepare the initial proposal
____ 2. Participate in contract negotiations
____ 3. Have sole responsibility for project design
____ 4. Delegate responsibility for project design
____ 5. Work on one project at a time

____ 6. Work on several projects at one time
____ 7. Submit unsolicited proposals
____ 8. Respond to solicited requests for a proposal
____ 9. Have professional competence in specific area under investigation
____ 10. Possess a solid background in educational research methodology

____ 11. Possess a significant degree of technical competence in the critical areas of the project
____ 12. Be a generalist rather than a specialist
____ 13. Identify scheduling constraints
____ 14. Estimate manpower requirements
____ 15. Have flexibility in designing project within predetermined specifications

____ 16. Identify physical facilities necessary for staff and project operation
____ 17. Secure physical facilities
____ 18. Select project personnel
____ 19. Train and develop personnel in order to carry out the activities called for in the project
____ 20. Assign personnel to specific project tasks

____ 21. Supervise, coordinate and control the activities of project personnel
____ 22. Define authority lines
____ 23. Define responsibilities of subordinates
____ 24. Expect subordinates to give advice freely
____ 25. Determine financial needs of project

____ 26. Develop the formal budget
____ 27. Have authority to make all decisions relating to project (vertical line)
____ 28. Have authority to direct the work on the project, regardless of the organizational level of the responsible person assigned to a task (horizontal movement across vertical lines)
____ 29. Report regularly to a higher level on progress of project
____ 30. Prepare written technical progress reports

____ 31. Use a management control technique for planning and scheduling (PERT, bar chart, milestone charts, etc.)
____ 32. Have authority to assign priority levels
____ 33. Allocate various time periods for completion of different phases of the project based upon talents of project staff
____ 34. Designate funds to various phases of work within the project
____ 35. Have authority to make decisions on trade-offs between schedules, budgets, and performance of project personnel

____ 36. Evaluate the performance of project personnel
____ 37. Have authority to dismiss personnel who are not performing
____ 38. Give credit when due to individual staff members
____ 39. Hold regularly scheduled staff meetings
____ 40. Use face-to-face communications as the best method to accomplish the management job

_____ 41. Devote most of management time to the functions of organizing and directing
_____ 42. Devote most of management time to the functions of controlling and organizing
_____ 43. Devote most of management time to the functions of planning and organizing
_____ 44. Devote most of management time to the functions of planning and controlling
_____ 45. Devote most of management time to the functions of controlling and directing

_____ 46. Devote most of management time to the functions of planning and directing
_____ 47. Outline steps needed to be taken to reach objectives
_____ 48. Establish important milestones for the project
_____ 49. Establish dates at which milestones should be accomplished
_____ 50. Never allow slippages or overruns to occur

_____ 51. Require all incoming external information to flow through the project director
_____ 52. Reply to all correspondence related to project
_____ 53. Participate as an active team member
_____ 54. Record all important work thoroughly
_____ 55. Prepare evaluative report at completion of project

_____ 56. Should have a degree in Educational Administration
_____ 57. Possess experience in a sector of the economy other than in the field of education

LIST BELOW ADDITIONAL DUTIES AND RESPONSIBILITIES OF A PROJECT MANAGER NOT ON THE ABOVE LIST.

58.

59.

60.

61.

62.